

Child and Family Services Update

May 30, 2003

To Make Your Life Easier...Using SAFE Optimally #41

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The Concept of “Case” in Safe—Now and Future

The concept of *Case* was given a central role when SAFE was developed. *Case* was defined as:

The assignment of a worker (or group of workers, one identified as *primary* and the others, *secondary*) to provide services to a child or family within the framework of a program or set of policies (now, *rules*). *Case* types may also be distinguished by differences in such things as:

- Workload standards (i.e., 15-18 new CPS per month; 4 or 6 PFP cases at a time; 12 or 15 SCF cases at a time).
- Worker skills sets (i.e., advanced assessment of maltreatment risk, rational-emotive therapy techniques, how to teach “no-lose” problem-solving).
- Program requirements (i.e., see a new client within 24 hours, case/service episode limited to 30 or 60 days, spend 15 hours a week working with family, visit twice a month).

We *transfer* cases when we change the primary worker, using the SAFE Worker Assignment window, but everything else about the case and our work with the child or family remains the same. We have *inter-region transfers*, where the new primary worker for a case is also in a different region. Sometimes people speak loosely of cases being “transferred” from one type to another (for example, from CPS to PSS). However, this is really more of a “transition” than a “transfer” because the policy and program requirements for working with the child or family are being changed.

In SAFE at the current time, to *transition* from one case type to another, the old case would be closed in the Case window and the new case created using the Case Creation window. There is a prompt in the various case closure wizards to give the person doing the closure the choice to navigate directly to Case Creation to initiate the new case as a part of the case closure process. In CPS to SCF transitions, there is a special provision in which the removal and placement initiated in the CPS case are transferred to the SCF case when an SCF case is created prior to CPS closure, making it really important to create the SCF case before the CPS case is closed.

With experience we have identified some limitations associated with relying only on this concept of *case* to track and manage services. These include a lack in continuity in the documentation of our work with clients as we evolve from case to case, and difficulty in coordinating the documentation for families when procedures dictate the creation of multiple cases at the same time for members of a single family.

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Future Directions in Safe

1. Case conversions. In a very limited way, we have started to allow *conversion* of cases from one type to another. Conversion implies that we change to the new policy and program requirements, but maintain continuity in information and requirements where applicable (such as not changing the due dates or action items at conversion, and being able to continue to see the entire sequence of activity log entries). SAFE currently allows conversion between PSC and PSS and between CPS and CFA (Western Region pilot only). In the future we are proposing the creation of a new Kinship service (KSS), which will be convertible back and forth with SCF if custody changes from kin to state or back, maintaining the original removal date and action items based on that date including the schedule for such things as permanency hearings. We have begun to study the possible conversion relationship of all of our case types with each other, to provide simpler and easier flow of changes in how we relate to clients system-wise over time.
2. Case and the support for the Practice Model. The Child and Family Services Practice Model includes the concepts of assessment, planning, and services being supported by living documents that continue for the duration of services to a child or family, and that services should relate to whole families. Development is planned to add or change at least three functions to be broader than individual cases and have the ability, if needed, to encompass multiple cases simultaneously and over periods of time:
 - a. Functional Assessment. Phase 1 of SAFE Functional Assessment is planned for implementation in the next few weeks (perhaps July 2003), to cover all cases types. It will replace SCF Social Summary and In-home Needs Assessment and 6-Month Peer Reviews. Functional Assessment Phase 2 with more options and features is planned for implementation at the same time as the SAFE Child and Family Plan.
 - b. Child and Family Plan. SAFE Child and Family Plan is planned for development and implementation in the next release following Functional Assessment. It will be a new tool to support services planning and progress reporting for all cases types to a family group and will flow directly out of the new Functional Assessment.
 - c. Activity recording. This proposal is to continue to do recording case by case, but to provide the option to view together, at the same time, activity entries from multiple cases that involve the same clients.